Vienna Statement

June 2026

eu-robotics.net

Executive Summary

Europe must set its own robotics agenda. While public fascination focuses on folding laundry or choreographed humanoid dancing routines, European citizens, industries, and institutions face urgent challenges that only capable robotic systems can address. These range from sustaining food and energy security, supporting an ageing population, reshoring manufacturing at scale, to maintaining critical infrastructure, securing space assets, and intervening in deep-sea emergencies.

Building on the Tallinn Statement (December 2025), this paper articulates the euRobotics community's position on three questions: Where are robots mission-critical for European sovereignty and resilience? How should AI contribute to these systems, and where should it not? And what must we do next to convert European strengths into a strategic global position?

Our answer is grounded in three principles: robots should work with and for people, not only instead of them; economic viability and sustainability are design requirements, not an afterthought; and the robotics community bears responsibility for the societal and environmental consequences of its work.

We identify domains from manufacturing, critical infrastructure and defence to scientific discovery and healthcare, where robots deliver transformative capability in conditions that are dangerous, inaccessible, or beyond human speed and precision. We clarify that AI is one component of a robotic system, valuable where it demonstrably improves perception, planning, or learning, but neither a substitute for robust engineering, innovative materials science, nor a justification for abandoning human authority.

Finally, we outline the next steps: mapping supply chain dependencies, developing practical adoption guidelines, and proposing measurable indicators for progress. This is an invitation to policymakers, industry, researchers, and investors to join euRobotics and shape Europe's robotics future collectively, rapidly, and sustainably.

euRobotics is THE place where collective action takes shape through conversations and debates. If the vision articulated here resonates (or not), if you want to contribute to defining where European robotics goes next, to accessing supply chain intelligence, and to shaping the policy environment, we invite you to **join us**.

Read the statement online

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Our vision for robotics in EU and what it absolutely needs

Building on the Tallinn Statement (December 2025), we assert that robotics is mission-critical for European sovereignty, resilience, and prosperity. Europe must define a confident, forward-looking robotics agenda, driven by genuine societal and strategic needs, rigorous technological scaling, and global competitiveness. The question is not whether Europe needs robots, but where they create the greatest value, and how we develop and deploy them responsibly.

Guiding Principles

- **Robots work *with and for people*, not only instead of people.** We do not seek to replace the human capacity to do, to learn, and to improve. Process knowledge resides in people; robots are tools that extend and amplify that knowledge. Europe needs a generation of skilled professionals who can do things themselves and use robots to do them better. A span of robot autonomy, not only substitution, is the paradigm. The adoption and scale-up of robotics technologies is essential to boosting productivity and resilience, and eliminating critical operational bottlenecks. For many businesses, adopting robotics is not a choice but a necessity they must face to remain competitive.
- **Sustainability is a design requirement, not an option.** Every robot consumes materials, energy, and attention. We commit to designing systems within planetary boundaries, minimising resource extraction, maximising longevity, and accounting for end-of-life. This is not idealism; it creates a competitive advantage, a prerequisite for market access, and a standard we expect of any robotic system entering the European market. Simultaneously, robotics can actively drive sustainability, making key circular economy processes, such as recycling, repair and remanufacturing, economically viable at scale through improved efficiency, consistency and cost reduction.
- **Interdisciplinarity and responsibility.** Robotics solutions must be developed with, not imposed upon, the communities they serve. Corporate leaders, policymakers, funding bodies, researchers and engineers must take responsibility for the societal and environmental consequences of their work. euRobotics accepts that a society is judged by how it treats its most vulnerable, and aims to reflect this through a balance of strategic and ethical choices.

Where Robots Are Mission-Critical: Initial Examples

Below are some domains where we believe that robots can deliver transformative capability, performing tasks 10–100× faster, at higher quality, or in conditions where human presence is impossible, unsafe, or unacceptable, and supporting reshoring efforts:

- **Advanced Manufacturing:** The foundation of automated production begins with industrial robots, ranging from single robotic workcells tending machines to synchronized lines welding complex structures. New forms of robotics will transform production. The future of European manufacturing relies on High-Mix, Low-Volume (HMLV) production—producing customized products at mass-production costs. By leveraging advanced AI and robotic perception to eliminate expensive fixtures, this flexibility becomes the norm. This ecosystem actively restores European industrial sovereignty while creating growth and high-value jobs.
- **Critical Infrastructure & Resilience.** Cost-efficient inspection, maintenance, and rapid repair of tunnels, bridges, power lines, transport networks and more. This removes workers from dangers of height, confined spaces, and toxic environments while keeping our society's foundations operational.
- **Healthcare & Companion Robotics:** Medical robots deliver sub-millimeter precision for complex interventions, like targeted tumor irradiation and orthopedic surgery, using real-time motion compensation to enable minimally invasive treatments with faster recovery times. Beyond the operating room, companion and physical assistance robots will be critical in addressing Europe's aging demographic. By supporting daily living and handling physically taking care tasks, they will help the elderly maintain independence longer while allowing human professionals to focus on complex, empathetic care.
- **Agri-food Robotics.** Robots working in harvesting, crop and livestock maintenance, soil management and packaging. Conditions can be harsh with an ageing workforce facing bad weather, freezing packing locations or hot greenhouses.
- **Space & Defence.** Automated satellite and in-orbit assets production, protection of space assets, resilient communications, and rapid deployment of defence systems designed, built, and scaled on European soil.
- **Construction.** Automation of repetitive tasks while decreasing labour accidents, robots can improve competitiveness and increase the quality of life of European citizens with novel added-value services.
- **Deep-Sea & Hazardous Environments.** Closing leaking valves at 800 m depth, decommissioning nuclear facilities, and operating in high-radiation or toxic atmospheres. In these domains autonomous robots are a strict necessity, not a convenience.
- **Scientific Discovery & Environment.** Field robots exploring ecosystems on Earth and beyond, mapping biodiversity, and laboratory robots accelerating identification of the next generation of critical materials, serving both science innovations and global stewardship.

These examples are illustrative, not exhaustive. They share a common thread: robots solving problems that matter for European citizens, industries, and strategic autonomy—within the boundaries of sustainability and human agency.

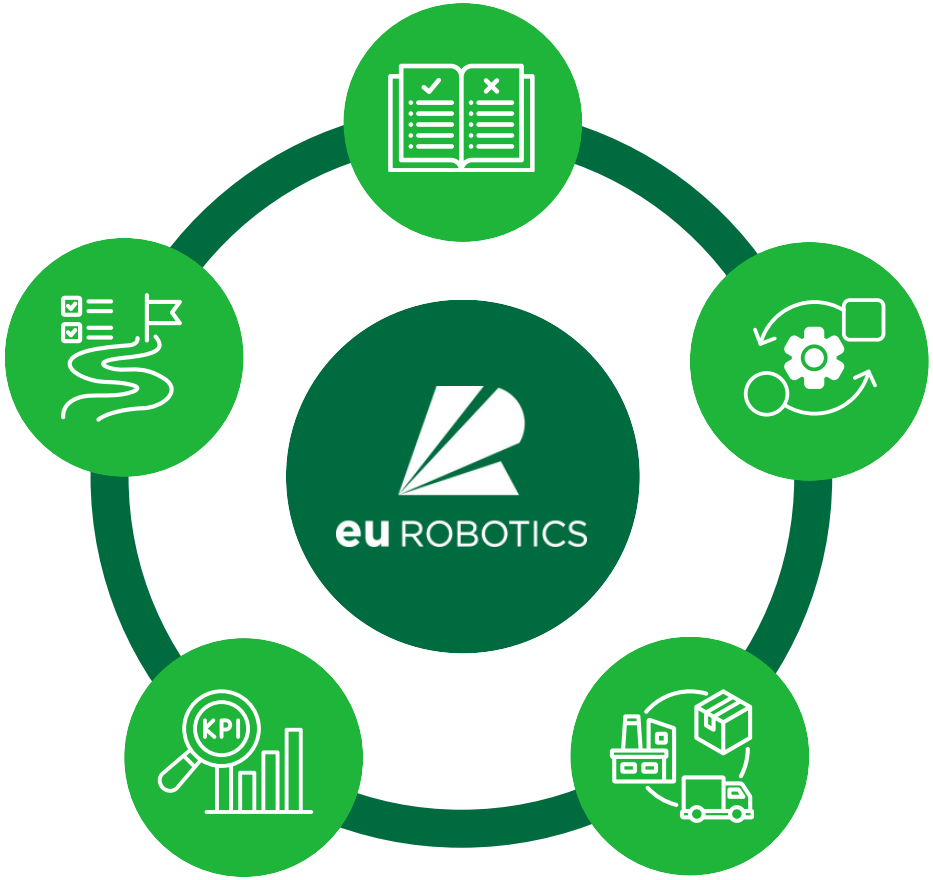
How Robotics is using AI

The current public discourse conflates "AI" with "robotics" and subsumes robotics entirely under the labels "Embodied AI" or “Physical AI”. It is important to be clear that AI is only one element of a robotic system. It is not the system itself. A robot is the sum of its mechanics, actuation, sensing, control, safety engineering, energy management, and human interaction; AI contributes where it adds demonstrable value. It’s important to remember that robots are the only way to physically interact with the environment. Europe must be precise about this distinction. By combining globally scalable software ecosystems with our unparalleled experience in hardware engineering, we can invest wisely and regulate effectively.

Outlook

To realize this vision and secure Europe's robotic foundations, euRobotics is driving collective action across five strategic priorities:

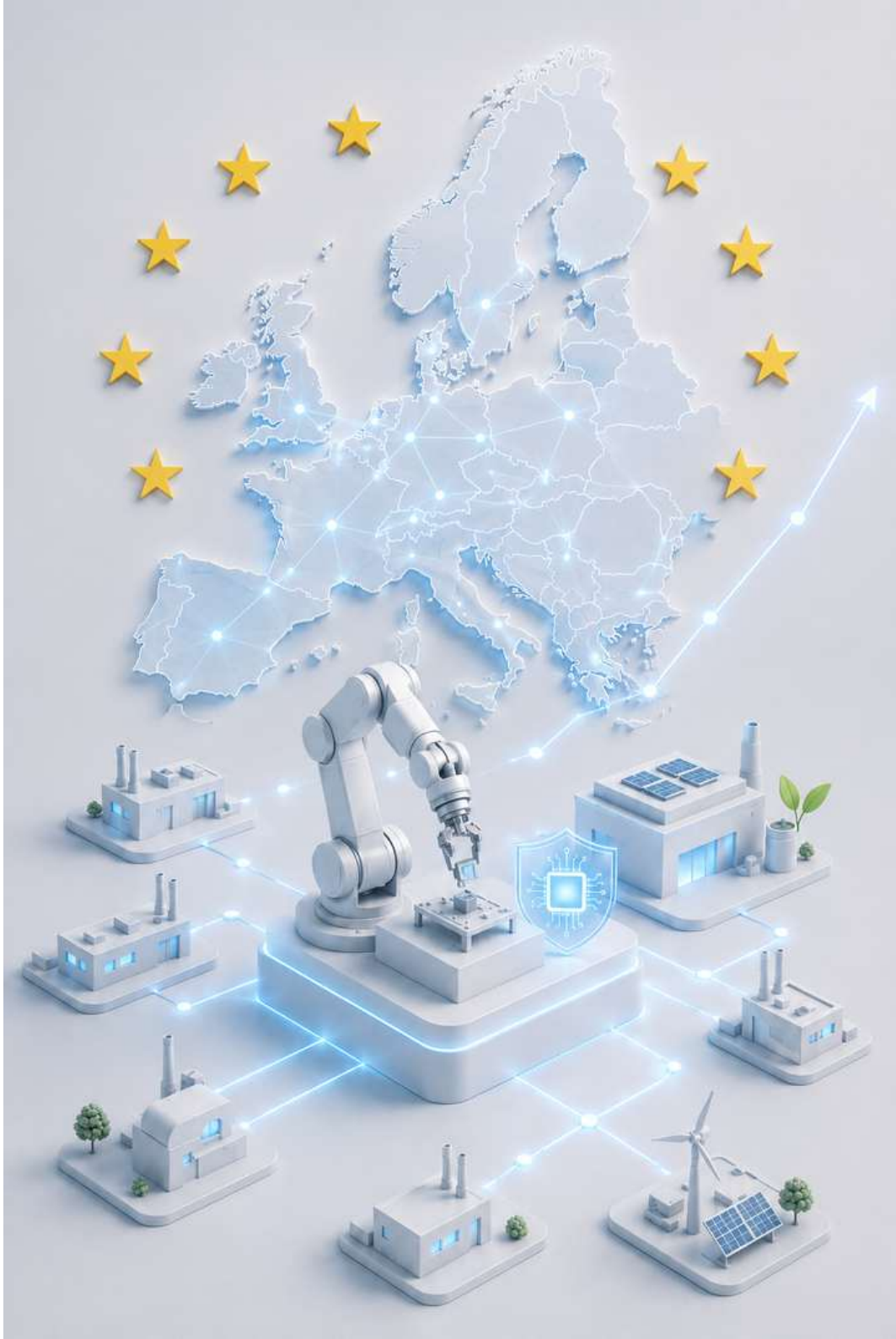
- **Develop practical guidelines** for the adoption of robotics in SMEs and public-sector organisations, moving from demonstration to deployment at scale.
- **Accelerate technology transfer** to build clear pathways that help research labs connect with the complementary researchers, industrial partners, large companies and SMEs needed to mature and scale their prototypes into real-world technology.
- **Share supply chain intelligence** with euRobotics members to enable informed sourcing and investment decisions.
- **Propose measurable indicators** (KPIs) that allow policymakers, industry, and the research community to track progress toward sovereignty, sustainability, and competitiveness goals.
- **Cross-reference and align** with existing roadmaps (ADRA, euROBIN, Draghi Report recommendations) to ensure coherence and avoid duplication of effort.



Europe's robotics community has decades of leadership in safety-critical systems, precision manufacturing, and human-robot collaboration. Our strength lies in our "Hidden Champions" tradition: mid-sized companies with deep domain expertise, close customer relationships, and world-class engineering. Europe already holds critical leadership in enabling sectors, including semiconductor manufacturing equipment, demonstrating that sustained investment in precision engineering yields global leadership.

Robotics follows the same model: learn the problem alongside the user, then scale the solution. This includes championing hardware leadership and building the scalable software ecosystems necessary for the future.

We must ensure these companies can grow in Europe without being forced to seek capital and cede IP overseas. The task now is to convert these strengths into strategic positions rapidly, collectively, and sustainably.



Call to action

This statement is an invitation to policymakers, industry leaders, researchers, investors, other associations and the broader public to engage with the European robotics community on our goals.

To policymakers: Robotics requires sustained, strategic, long-term investment distinct from and complementary to AI funding. Regulation must be risk-proportionate, domain-aware, and developed with input from those who build and deploy these systems. Standards and market access rules should reflect European values: safety, sustainability, and sovereignty. Roboticists should have access to mechanisms that de-risk experimentation, including insurance frameworks, regulatory sandboxes, tax credits for first adopters, and streamlined liability rules, so that our SMEs get all the support they need for successful implementation without getting lost in bureaucracy.

To large industries, SMEs, developers and innovators: Open your labs. Share your successes and your failures. Participate in technology transfer networks that turn isolated excellence into collective capability. The path from the first "No" to scaled deployment must become shorter. Together, we can define it.

To investors and financial institutions: Europe's robotics innovators need growth capital with a long-term perspective that does not require surrendering IP and relocating value creation overseas. Investors have a unique opportunity to capture real value by backing European robotics—bridging the gap between grant-funded innovation and market-scale deployment. This isn't protectionism; it's completing an investment cycle that today leaks value precisely at the moment it should scale.

To the research community: Embrace interdisciplinarity and accept responsibility for consequences. The most valuable robotics research of the next decade will not be judged solely by novelty, but by whether it made European citizens safer, more capable, and more resilient. Be ambitious, entrepreneurial and outward-looking: see your work as the foundation for creating successful European businesses, engage early with investors and end users, and recognise that impact is realised not just in the lab, but when ideas are translated into deployed, scalable solutions.

About euRobotics

euRobotics (eu-robotics.net) is an international non-profit association for all stakeholders in European robotics. Established in September 2012 and serving its founding purpose: to strengthen Europe's competitiveness and to ensure industrial leadership of manufacturers, providers and end-users of robotics technology-based systems and services, it forms the largest network of roboticists and business in Europe with about 250 institutional members, covering small and large companies, associations and institutions, universities, laboratories and RTOs.

The objectives of euRobotics are to boost European robotics research, development and innovation, to foster a positive perception of robotics, to support the widest and most effective uptake of robotics technologies and services for professional and private use, and to ensure the excellence of the robotics science base in Europe is maintained. euRobotics is a founding member of the AI, Data and Robotics Association (ADRA) and was the private partner in the SPARC partnership with the EC during Horizon 2020.

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